

# Community Preservation Committee Town of Belmont

## Standard Application Process

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### Step One

Applicants must submit ten copies of the **Preliminary Application** to the Community Preservation Committee (CPC) by no later than 4pm on October 2, 2015. Applications will be date stamped and assigned a control number in the order that they are received. The CPC will review submitted applications to ensure the proposed projects can be legally funded from Community Preservation funds, and are consistent with the goals for CPA funding as set forth in the current Community Preservation Plan.

Please review the CPA legislation and the Belmont CPA Bylaw prior to submitting CPA funding applications.

<http://www.belmont-ma.gov/community-preservation-committee>

Applicants are invited to attend the CPC's Public Meeting on September 17, 2015 to ask any questions they may have regarding the application process.

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### Step Two

If a project is determined to be eligible for CPC funds, the applicant will be asked to complete a **Final Application**.

Please note that an invitation to submit a Final Application does not imply project approval or endorsement from the CPC. Only after reviewing all final applications will the CPC determine which projects to recommend to Town Meeting.

The following information will be required to complete the final application:

- **Goals:** What are the goals of the proposed project?
- **Community Need:** Why is the project needed? Does it address needs identified in existing Town plans?
- **Community Support:** What is the nature and level of support for this project? Include any letters of support and petitions.
- **Project Documentation:** Attach any applicable engineering plans, architectural drawings, site plans, photographs, any other renderings, relevant studies or material.

- **Timeline:** What is the schedule for project implementation, including a timeline for all critical milestones?
- **Credentials:** How will the experience of the applicant contribute to the success of this project?
- **Success Factors:** How will the success of this project be measured?
- **Budget:** What is the total budget for the project and how will CPA funds be spent? All items of expenditure must be clearly identified. Distinguish between hard and soft costs and contingencies. (NOTE: CPA funds may not be used for maintenance.)
- **Other Funding:** What additional funding sources are available, committed, or under consideration? Include commitment letters, if available, and describe any other attempts to secure funding for this project.
- **Maintenance:** If ongoing maintenance is required for your project, how will it be funded?
- **Impact on Town Budget:** What, if any, potential secondary effects will your proposed project have on the Town's Operating Budget? Are there any capital projects that rely on the successful completion of your project?

Additional information, as applicable, may also be required. Such as:

- **Control of Site:** Documentation that you have control over the site, such as a Purchase and Sales Agreement, option or deed. If the applicant does not have site control, explain how public benefits will be protected in perpetuity.
- **Deed Restrictions:** In order for funding to be distributed, an appropriate deed restriction, meeting the requirements of Chapter 184 of Mass General Laws pursuant to section 12 of the Community Preservation Act, must be filed with the CPC. Provide a copy of the actual or proposed restrictions that will apply to this project.
- **Acquisitions:** For acquisition projects, attach appraisals and agreements if available. Attach a copy of the deed.
- **Feasibility:** Provide a list of all further actions or steps that will be required for completion of the project, such as environmental assessments, zoning approvals, and any other known barriers to moving forward.
- **Hazardous Materials:** Provide evidence that the proposed project site is free of hazardous materials or there is a plan for remediation in place.
- **Permitting:** Provide evidence that the project does not violate any zoning ordinances, covenants, restrictions or other laws or regulations. What permits, if any, are needed for this project? Provide the expected date of receipt for necessary permits, and copies of any permits already acquired.
- **Environmental Concerns:** Identify all known wetlands, floodplains, and/or any natural resource limitation that occur within the boundaries of your submission.

- **Professional Standards:** Evidence that appropriate professional standards will be followed if construction, restoration or rehabilitation is proposed. Evidence that the applicant has the proven or potential capacity to conduct the scope and scale of the proposed project, as evidenced by project leaders with appropriate qualifications and technical experience or access to technical expertise.
- **Further Attachments:** Assessor's map showing location of the project.

Applicants will present their projects at the **CPC Public Meeting on November 12, 2015** and address questions from Belmont residents. It is required that information about the project be in writing and copied for distribution and review at the Public Meeting. This is also an opportunity for project sponsors to ask the CPC any questions regarding the application process.

Ten copies of the **Final Application** must be submitted to the CPC by no later than 4pm on December 4, 2015 in order to be considered for the Spring 2015 Town Meeting. Applications will be date stamped and assigned a control number in the order that they are received.

Unless an applicant can demonstrate that a significant opportunity would otherwise be lost, preliminary applications and final applications will not be accepted after their respective deadlines. **In order for the CPC to consider a project proposal that cannot adhere to the deadlines as outlined in the Standard Application Process, the project must meet the additional selection criteria as outlined in the Special Application Process.**

The CPC will review the Final Applications. Applicants will be contacted if additional information or an interview is required. The CPC may also request to visit the site of the proposed project. Applicants will be notified by January 15, 2016 whether the CPC plans to recommend their project at the 2016 Annual Town Meeting.

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## **Step Three**

The selected applicants will submit an electronic copy of their completed Town Meeting Project Summary Form to the CPC by March 1, 2016. The CPC will consult with the Board of Selectmen, Warrant Committee, and Capital Budget Committee regarding the selected projects. The CPC will then reassess each project during the CPC Meeting on March 9, 2016. The CPC will review the outcome of the Town board advisory meetings and examine whether sponsors have performed sufficient research to identify the secondary budgetary effects of their projects. **The CPC reserves the right to withdraw its support for any proposed project at this CPC Meeting or at any point prior to the 2016 Annual Town Meeting.**

Any PowerPoint slides intended to be used for the 2016 Annual Town Meeting will be submitted by April 1, 2016. **The selected applicants will be present at the League of Women Voters Meeting in April 2016 to give a brief five minute presentation on their project and to answer questions from the public.**

The CPC will make its final recommendations for funding in the form of one or more warrant articles to be voted on at the 2016 Annual Town Meeting.

The CPC may recommend:

- the project as proposed by the applicant,
- a modified version of the original project,
- partial funding for the project,
- funding for only a portion or phase of the proposed project.

The CPC's recommendations to Town Meeting may include detailed project scopes, conditions, and other specifications, as the CPC deems appropriate to ensure CPA compliance and project performance.

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## Step Four

**The CPC will read the articles for each of the recommended projects at Town Meeting for discussion and vote. The selected applicants will give a brief five minute presentation on their project and answer questions from Town Meeting members.** Town Meeting has the final authority to award the CPC's recommended funds from Belmont's Community Preservation Act Fund.

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## Step Five

**Funding will be available for Approved Projects following an affirmative vote of Town Meeting, starting July 1<sup>st</sup> of the applicable fiscal year.**

Projects financed with CPA funds must comply with all applicable state and municipal requirements, including the state procurement law, which requires special procedures for the selection of products, vendors, services, and consultants. Project sponsors are required to meet with Belmont's Procurement Coordinator before the Town will enter any into contracts or issue any purchase orders. However, this requirement can be waived if adherence to procurement procedures will be overseen by a Town Department Head or other MCPPO certified third party.

All CPA funds are administered and disbursed by the Town of Belmont. Project management, oversight, execution, and financial control will be under the control of the Town Administrator or his designee.

For more information regarding the **Funding Process**, refer to the Community Preservation Plan.

The CPC requires periodic status updates from the recipients of CPC funding. Updates will occur no less than annually and upon project completion. Written updates will be coordinated by the Staff Liaison. The purpose of such an update is to aid the CPC in refining the CPA Plan, in identifying issues that may assist future applicants, and in reporting progress to the Town.

## **Projected 2015/2016 CPA Timeline**

July 1, 2015	Preliminary Applications Available
September 17, 2015	Public Meeting [7:00 pm]
October 2, 2015	Preliminary Applications Due [4:00 pm]
November 12, 2015	Public Meeting [7:00 pm]
December 4, 2015	Final Applications Due [4:00 pm]
January 15, 2016	CPC Selects Projects
March 1, 2016	Project Summary Reports Due
April 1, 2016	PowerPoint Files Due (if applicable)
Late April 2016	League of Women Voters Meeting
May 4, 2016	Town Meeting

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If you have additional questions about this process, please contact:

**The Community Preservation Hotline**  
617-993-2774

-or-

**Michael Trainor**  
mtrainor@belmont-ma.gov

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The following is a list of the appointed committee members:

**Margaret Velie, Chair**  
Conservation Commission Designee

**Anne Marie Mahoney, Vice Chair**  
Selectmen Appointee

**Floyd Carman, Clerk**  
Selectmen Appointee

**Anthony Ferrante**  
Recreation Commission Designee

**Lisa Harrington**  
Historic District Commission Designee

**Gloria Leipzig**  
Housing Authority Designee

**Paul Solomon**  
Selectmen Appointee

**Jim Williams**  
Board of Parks Commissioners

# Community Preservation Committee Town of Belmont

## Special Application Process

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Use of the **Special Application Process** is only granted by the CPC under the unique circumstances that a significant opportunity would otherwise be lost if the application were to be processed using the standard timeline (as outlined in the **Standard Application**).

The CPC will allow an applicant to utilize the **Special Application Process** only if the project meets the General Selection Criteria on Page 7 of the Community Preservation Plan, the Specific Criteria for the affected community asset category, and the following additional criteria:

- The proponents were unaware of the opportunity to undertake the project; or the proponents did not have authority to identify the opportunity prior to the **Preliminary Application Deadline** of October 2, 2015.
- The applicant has either: (a) a letter of intent signed by the current owner of the real property expressing an interest in selling to the applicant; or (b) legal control (an option, signed purchase and sale agreement or legal title) of the real property.
- The project is supported by one or more Town Boards with responsibility for projects of a similar nature.
- Failure to secure CPA funding will create a high likelihood that the project will not be able to be carried out to the benefit of the Town, because the opportunity is of very short duration.
- Appropriation of CPA funding will contribute materially to the likelihood of success for the project.
- The project holds a high priority in the Comprehensive Plan, the Housing Plan, the Open Space and Recreation Plan, or other planning documents currently accepted and utilized by the Town.

Should the CPC grant use of the **Special Application Process**, the CPC will continue to adhere to the applicable procedures as outlined in the **Standard Application Process**. Only the pertinent submission and hearing deadlines will be changed in order to accommodate the unique conditions surrounding the proposed project.

If the timing of the application is such that the CPC cannot meet the deadline for the Annual Town Meeting, the applicant or the Selectmen must call a **Special Town Meeting** for the purpose of considering the appropriation of CPA funds for the proposed project. The CPC will not be responsible for recommending a **Special Town Meeting** or any other changes in the Town's calendar.

# Community Preservation Committee Town of Belmont

## **Funding Process**

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### ***Initial Documentation***

Following approval from Belmont's **Annual Town Meeting** or **Special Town Meeting**, the Community Preservation Committee will notify grant recipients of the funding that has been awarded. This award letter will outline any terms, funding conditions, or additional instructions applicable to the approved CPA grant. A confirmation of receipt must be returned to the CPC as proof that project sponsors received the procurement procedures and accepted the terms and conditions outlined in the award letter.

Projects financed with CPA funds must comply with all applicable state and municipal requirements, including the state procurement law, which requires special procedures for the selection of products, vendors, services, and consultants. Project sponsors are required to meet with Belmont's Procurement Coordinator before the Town will enter any into contracts or issue any purchase orders. However, this requirement can be waived if adherence to procurement procedures will be overseen by a Town Department Head or other MCPPO certified third party.

**Should a property or artifact that has benefitted from CPA funding be sold or given to a new owner within five years of the award letter's issuance date, the CPA fund must be reimbursed the entire amount awarded unless the CPC waives this requirement in part or in its entirety.**

Supplementary contracts may be required by the Town Administrator's Office, depending on the details of the approved project. For construction projects, recipients of CPA funds and all contractors on the project may be asked to have their general liability insurer add the Town of Belmont as an additional insured. Proof of this coverage must be submitted to the CPC before any invoices can be paid using CPA funds. Projects on Town owned properties that are already required to indemnify the Town may be asked to reconfirm coverage before any invoices can be paid.

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### ***Updates to the CPC***

Grant recipients will notify the CPC when work on projects has commenced and submit periodic project status updates. Progress Reports will be submitted to the CPC and incorporated into the Annual Town Meeting CPA package. Approved projects will be carried out in accordance with the terms outlined in the award letter and any supplementary contracts from the Town. Any significant deviations from the project as presented in the original **Final Application** must be approved by the CPC to ensure that such changes are CPA-eligible expenditures and within the scope of the project as approved by Town Meeting.

Grant recipients should contact the **Community Preservation Hotline** at **617-993-2774** or **Michael Trainor** at **mtrainor@belmont-ma.gov** to notify the CPC of any significant changes to their projects.

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## ***Expenditures***

Invoices will be submitted to the CPC for their approval. Approved expenditures will be processed through the Town Accountant's Office and paid through the Treasurers Office. Any funds for a CPA project that remain at the completion of work will return to the general CPA fund once the project is officially closed. The remaining funds will then be reappropriated at the next Town Meeting, unless the CPC votes to approve the use of remaining funds for the completion of additional related work. In such cases, approval will be dependent upon whether the additional proposed work is within the general scope and intent of the original **Final Application**.

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## ***Closing Process***

CPA grant recipients will notify the CPC in writing through a Final Progress Report when work is completed for their project. Once this notification is received, the CPC will review the initial acceptance letter to make sure that all terms and conditions have been met. The CPC will schedule a final site visit as appropriate with the CPA grant recipient to examine and photograph the completed work. If a final site visit is not appropriate for the project, the CPC may accept photographs or hardcopies of the deliverable as additional proof that the CPA project has been completed. The CPC will also generate a final summary of the CPA fund expenditures for the project. Once all tasks have been performed, the CPC will vote to officially close the project file.

Once the project file is officially closed, the CPC will work with the Town Accountant to return any unexpended funds to the general CPA fund. **Projects must be officially closed before June 30 of the current year for the funds to be available for reappropriation at the following year's Town Meeting.**

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## ***Additional Requirements***

CPA grant recipients are required to acknowledge the Community Preservation Act in all press releases, publicity materials, news, and written or oral announcements about work supported by CPA funds.

**Projects receiving CPA funds must be completed within 30 months following the Town Meeting approval**, unless the CPC votes to approve an extension of time due to compelling and documented circumstances. Without such support, the CPC may recommend to rescind any remaining CPA funds at a subsequent Town Meeting.



**Community Preservation Committee  
Town of Belmont**

**CPA Funding - Preliminary Application**

Ten copies of the completed Preliminary Application must be submitted to the following address  
**by no later than 4pm on October 2, 2015:**

Community Preservation Committee  
c/o Floyd S. Carman, Treasurer  
Town of Belmont  
PO Box 56  
Belmont, MA 02478

**Project Title**\_\_\_\_\_

**Applicant/Contact Person**\_\_\_\_\_

**Organization**\_\_\_\_\_

**Mailing Address**\_\_\_\_\_

**Telephone**\_\_\_\_\_ **E-mail**\_\_\_\_\_

**Signature**\_\_\_\_\_ **Date**\_\_\_\_\_

CPA Category (*refer to chart on the following page and check all that apply*):

- |  |  |
|--|--|
| <input type="checkbox"/> Community Housing | <input type="checkbox"/> Historic Preservation |
| <input type="checkbox"/> Open Space        | <input type="checkbox"/> Recreation            |

**Amount Requested**\_\_\_\_\_

**Total Project Cost**\_\_\_\_\_

**Chart 1**  
**COMMUNITY PRESERVATION FUND ALLOWABLE SPENDING PURPOSES (G.L. c. 44B, § 5)**

	OPEN SPACE	HISTORIC RESOURCES	RECREATIONAL LAND	COMMUNITY HOUSING
<b>DEFINITIONS</b> (G.L. c. 44B, § 2)	Land to protect existing and future well fields, aquifers and recharge areas, watershed land, agricultural land, grasslands, fields, forest land, fresh and salt water marshes and other wetlands, ocean, river, stream, lake and pond frontage, beaches, dunes and other coastal lands, lands to protect scenic vistas, land for wildlife or nature preserve and land for recreational use	Building, structure, vessel, real property, document or artifact listed on the state register of historic places or determined by the local historic preservation commission to be significant in the history, archeology, architecture or culture of the city or town	Land for active or passive recreational use including, but not limited to, the use of land for community gardens, trails, and noncommercial youth and adult sports, and the use of land as a park, playground or athletic field  Does <u>not</u> include horse or dog racing or the use of land for a stadium, gymnasium or similar structure.	Housing for low and moderate income individuals and families, including low or moderate income seniors  Moderate income is less than 100%, and low income is less than 80%, of US HUD Area Wide Median Income
<b>ACQUISITION</b> Obtain property interest by gift, purchase, devise, grant, rental, rental purchase, lease or otherwise. Only includes eminent domain taking as provided by G.L. c. 44B	Yes	Yes	Yes	Yes
<b>CREATION</b> To bring into being or cause to exist. <i>Seideman v. City of Newton</i> , 452 Mass. 472 (2008)	Yes	X	Yes	Yes
<b>PRESERVATION</b> Protect personal or real property from injury, harm or destruction	Yes	Yes	Yes	Yes
<b>SUPPORT</b> Provide grants, loans, rental assistance, security deposits, interest-rate write downs or other forms of assistance directly to individuals and families who are eligible for community housing, or to entity that owns, operates or manages such housing, for the purpose of making housing affordable	X	X	X	Yes, includes funding for community's affordable housing trust
<b>REHABILITATION AND RESTORATION</b> Make capital improvements, or extraordinary repairs to make assets functional for intended use, including improvements to comply with federal, state or local building or access codes or federal standards for rehabilitation of historic properties	Yes if acquired or created with CP funds	Yes	Yes	Yes if acquired or created with CP funds

**Brief Description of Project**

Include the address/location and current owner of the property, as well as any critical dates. Please attach supplemental information (photographs, drawings, documents, etc.) as desired

**Brief Description of Benefit**

How does the project fulfill the General and Specific Criteria of the Community Preservation Committee Guidelines?

**Community Preservation Committee  
Town of Belmont**

**CPA Funding – Final Application**

Ten copies of the completed Final Application must be submitted to the following address **by no later than 4pm on December 4, 2015:**

Community Preservation Committee  
c/o Floyd S. Carman, Treasurer  
Town of Belmont  
PO Box 56  
Belmont, MA 02478

**Project Title**\_\_\_\_\_

**Applicant/Contact Person**\_\_\_\_\_

**Organization**\_\_\_\_\_

**Mailing Address**\_\_\_\_\_

**Telephone**\_\_\_\_\_ **E-mail**\_\_\_\_\_

**Signature**\_\_\_\_\_ **Date**\_\_\_\_\_

CPA Category (*check all that apply*):

- |  |  |
|--|--|
| <input type="checkbox"/> Community Housing | <input type="checkbox"/> Historic Preservation |
| <input type="checkbox"/> Open Space        | <input type="checkbox"/> Recreation            |

**Amount Requested**\_\_\_\_\_

**Total Project Cost**\_\_\_\_\_

**PROJECT DESCRIPTION:** Attach answers to the following questions. Applications will be returned as incomplete if all requested information is not provided. Include supporting materials as necessary.

1. **Goals:** What are the goals of the proposed project?
2. **Community Need:** Why is the project needed? Does it address needs identified in existing Town plans?
3. **Community Support:** What is the nature and level of support for this project? Include letters of support and any petitions.
4. **Project Documentation:** Attach any applicable engineering plans, architectural drawings, site plans, photographs, any other renderings, relevant studies or material.
5. **Timeline:** What is the schedule for project implementation, including a timeline for all critical milestones?
6. **Credentials:** How will the experience of the applicant contribute to the success of this project?
7. **Success Factors:** How will the success of this project be measured? Be as specific as possible.
8. **Budget:** What is the total budget for the project and how will CPA funds be spent? All items of expenditure must be clearly identified. Distinguish between hard and soft costs and contingencies. (NOTE: CPA funds may not be used for maintenance.)
9. **Other Funding:** What additional funding sources are available, committed, or under consideration? Include commitment letters, if available, and describe any other attempts to secure funding for this project.
10. **Maintenance:** If ongoing maintenance is required for your project, how will it be funded?
11. **Impact on Town Budget:** What, if any, potential secondary effects will your proposed project have on the Town's Operating Budget? Are there any capital projects that rely on the successful completion of your project?

**ADDITIONAL INFORMATION:** Provide the following additional information, as applicable.

1. **Control of Site:** Documentation that you have control over the site, such as a Purchase and Sales Agreement, option or deed. If the applicant does not have site control, explain how public benefits will be protected in perpetuity.
2. **Deed Restrictions:** In order for funding to be distributed, an appropriate deed restriction, meeting the requirements of Chapter 184 of Mass General Laws pursuant to section 12 of the Community Preservation Act, must be filed with the CPC. Provide a copy of the actual or proposed restrictions that will apply to this project.

3. **Acquisitions:** For acquisition projects, attach appraisals and agreements if available. Attach a copy of the deed.
4. **Feasibility:** Provide a list of all further actions or steps that will be required for completion of the project, such as environmental assessments, zoning approvals, and any other known barriers to moving forward.
5. **Hazardous Materials:** Provide evidence that the proposed project site is free of hazardous materials or there is a plan for remediation in place.
6. **Permitting:** Provide evidence that the project does not violate any zoning ordinances, covenants, restrictions or other laws or regulations. What permits, if any, are needed for this project? Provide the expected date of receipt for necessary permits, and copies of any permits already acquired.
7. **Environmental Concerns:** Identify all known wetlands, floodplains, and/or any natural resource limitation that occur within the boundaries of your submission.
8. **Professional Standards:** Evidence that appropriate professional standards will be followed if construction, restoration or rehabilitation is proposed. Evidence that the applicant has the proven or potential capacity to conduct the scope and scale of the proposed project, as evidenced by project leaders with appropriate qualifications and technical experience or access to technical expertise.
9. **Further Attachments:** Assessor's map showing location of the project.

REMINDER: Projects financed with CPA funds must comply with all applicable state and municipal requirements, including the state procurement law, which requires special procedures for the selection of products, vendors, services, and consultants. Project sponsors will be required to meet with Belmont's Procurement Coordinator before the Town enters into any contracts or issues any purchase orders. However, this requirement can be waived if adherence to procurement procedures will be overseen by a Town Department Head or other MCPPO certified third party.